

Result of the Sake Preference Survey Conducted on International Consumers

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1. Introduction

According to the Ministry of Finance, Japan, the volume of sake exported in 2018 was about 25.75 million liters. It was up 10% from the previous year, and on the rise for 9 consecutive years. This export brought in more than 22.2 billion yen, which was the first time to surpass the 20 billion benchmark. The amount of trade has tripled in this decade. This indicates that the opportunity for people around the world to drink sake has blossomed. According to JNTO (Japan National Tourism Organization), the number of inbound tourists to Japan increased to 31.19 million in 2018, and the highest number of tourists has been renewed for 6 consecutive years. This number of tourists is expected to vastly increase due to 2020 Tokyo Olympic & Paralympic Games and 2025 Osaka World Exposition. A lot of people are expecting to increase the sale of sake at these opportunities.

In order to promote the sale of sake, however, there is insufficient information to optimize the chance, make effective sale, and provide services for tourist to enjoy. For people coming in from around the world, there are no information what kind of sake they like, and how they prefer to drink it.

In order to effectively promote the sale of sake and to maximize customer satisfaction, the project team has carried out a survey to access the preference of international consumers including Japanese living abroad. This report summarizes the findings obtained from the survey, and propose effective sake promotion measures to appeal and provide services to international consumers.

2. Summary of the Survey

Table 1 shows the summary of the questionnaire survey conducted.

Table 1 Summary of the Questionnaire Survey

| | |
|---------------------|---|
| Investigative body | Project team for sake preference survey targeting international consumers, Research and Evaluation Group of Local Sake SSI International (SSI INT'L) |
| Survey period | February 14 - April 30, 2018 |
| Survey method | Web survey using Google Form |
| Languages | Japanese, English, Chinese, Korean |
| People surveyed | International consumers who have the opportunity to drink sake at least once, including Japanese living overseas |
| Number of responses | 461 (Of these, valid responses are 439) |

The questions were from the following 7 categories:

- 1) Attributes of the respondents: place of residence, age, gender, household income, etc.;
- 2) How to drink sake: first experience, frequency to drink, serving temperature, type of food paired with, alcohol beverages usually drank;
- 3) Preference for sake: favorite type, deciding factor in selection, places to drink;
- 4) Sake purchase and order: stores to buy, size and price to buy, size and price to order in a

- restaurant;
- 5) Comparison of sake produced in Japan or produced overseas: adherence to Japanese products, evaluation of both products;
- 6) Future demand and chances of growth: projected demand, what needs to be done to increase sake fans; and
- 7) Opinions and suggestions towards sake produced in Japan.

3. Attributes of Respondents

3.1 Regions of Resident

The regions of resident are categorized into 9 according to the response as shown in Table 2. Figure 1 shows the percentage of the respondent residing in that region.

Table 2 Regions

| Places of residence (regional classification) | |
|---|---|
| Taiwan | 170 |
| Korea | 86 |
| North America | 47 USA 43, Canada 3, Mexico |
| Hong Kong | 41 |
| Europe | 32 Germany 8, England 7, France 4, Italy 3, Austria 2, Ireland 2, Switzerland 2, Spain, Netherlands, Poland, Sweden |
| China | 28 |
| Southeast Asia | 15 Singapore 11, Malaysia 2, Thailand, Philippines |
| Japan | 14 |
| Others | 6 Australia 2, Ecuador, UAE, Bahrain, New Zealand |
| Total | 439 |

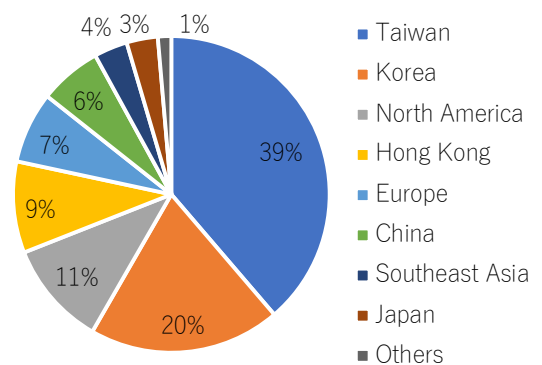


Figure 1 Percentage of Each Region

3.2 Age Groups

Figures 2 and 3 show the age groups of respondents in all regions and by region, respectively. In total, the age distribution is 30's 38%, 20's 27%, 40's 24%, 50's 8%, and over 60's 3% in descending order. On the other hand, age group by regions show the difference of age in different regions. An extreme example is for Korea, where 80% is in their 20's. The reason for this disparity is due to the fact that the respondents in Korea were students in Soongsil University, which is a partner university of SSI International.

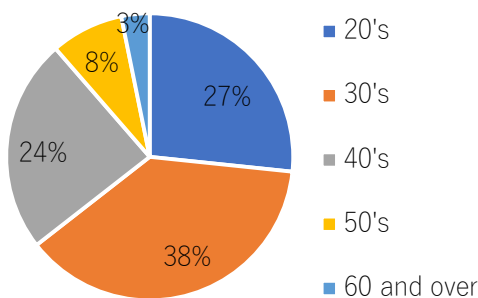


Figure 2 Age Groups

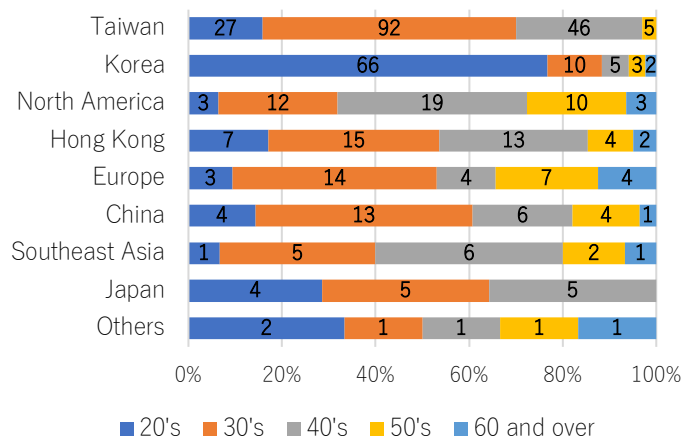


Figure 3 Age Groups by Region

3.3 Gender

Figure 4 shows the gender of respondents. The percentage of male and female are about 60 and 40, respectively.

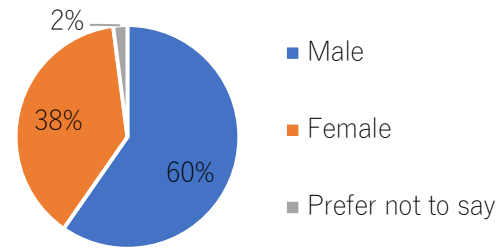


Figure 4 Genders

3.4 Household Income

Figures 5 and 6 show the household income of respondents for all and by regions. The exchange rate used were, 1US\$=100yen, 1NT\$=3.6yen, and 10 Korean won=1yen. The results of household income indicate that income of under 4.5 million accounts for 41%, the second group was household with more than 10 million yen income at 26%. The result by region indicates that households in North America, Hong Kong, and China have higher incomes. Based on the age attribute 80% of the respondents from Korea are in their 20's and are students, and this may contribute to the result of lesser income.

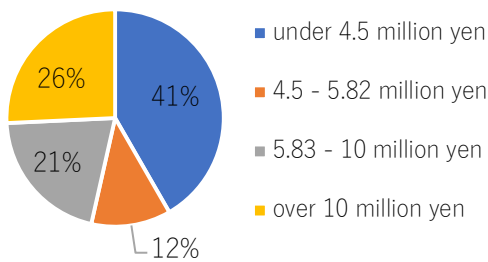


Figure 5 Household Income

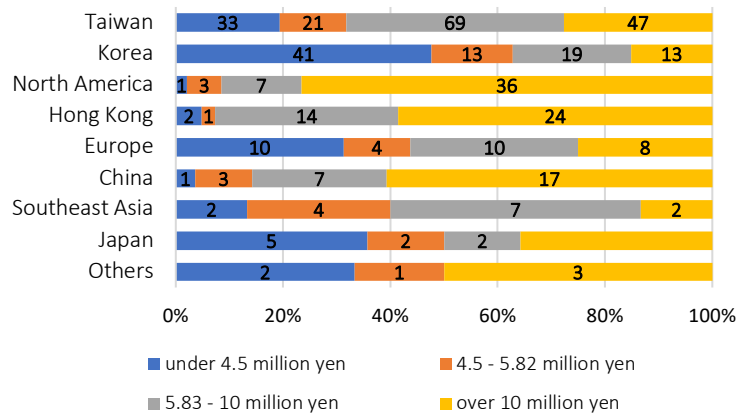


Figure 6 Household Income by Region

Based on the results of individual attribute of respondents, most responses in Korea are from students of 20's, which are extremely different from other regions in terms of age and household income. Therefore, we had to exclude responses from Korea, and 347 data have been analyzed hereafter.

4. Results of Survey

4.1 First Experience with Sake

To the question "When were you first introduced to sake?" with one or two selectable options, "interest in Japanese food" and "interest in Japanese culture" were the most common responses as shown in Figure 7. When we include the response of "during a trip to Japan", the interest in Japan like Japanese food and Japanese culture is the strongest trigger for the first chance to drink sake. Since interest in Japanese cuisine is the strongest factor to experience sake, it is a good reason to what the international consumers expect in Japanese cuisine. "Suggestion by restaurant staff" and "interest in advertisement on TV or internet" were minority responses, but "like to drink alcoholic beverage" and "at an event of Japanese food or sake" had considerable amount of response. There was no difference by regions.

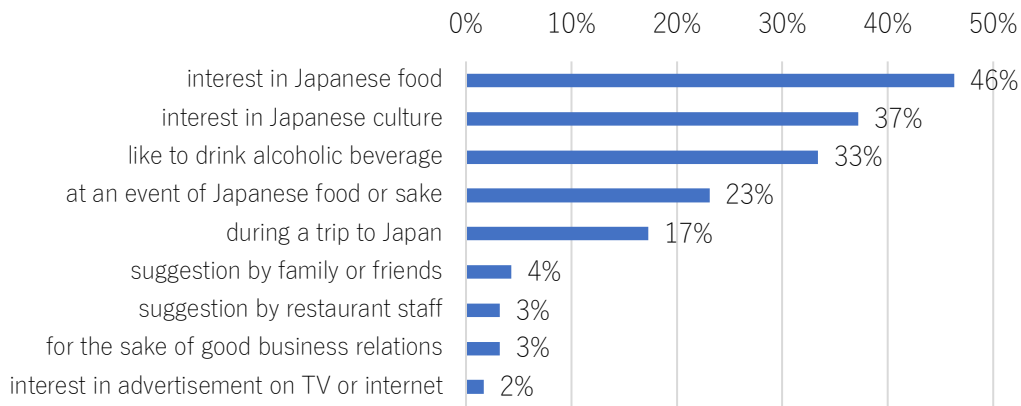


Figure 7 First opportunity to drink sake

4.2 Frequency of Drinking Sake

To the question “How often do you drink sake?”, the respondents who infrequently drink sake, responding “hardly drink”(13%) or “one or two days in a month”(45%), make up almost 60% as shown in Figure 8. The respondents who regularly drink sake, responding “one or two days in a week”(27%) or “more than two days in a week”(15%), are the remaining 40%. By region, the number of respondents who regularly drink sake are large in Hong Kong(61%), China(50%), others(50%), and Taiwan(43%) as shown in Figure 9.

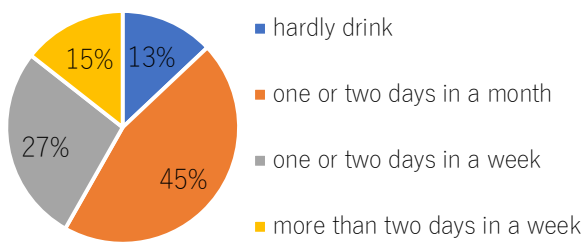


Figure 8 Frequency of Drinking Sake

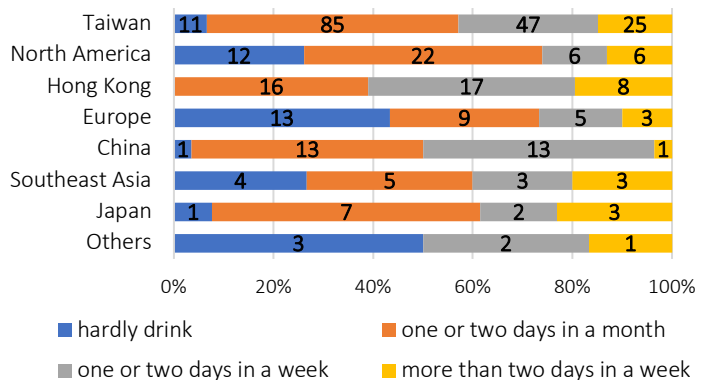


Figure 9 Frequency of Drinking Sake by Region

4.3 Temperature of Serving Sake

To the question “How do you usually drink sake?”, “chilled” was the most common response (64%), followed by “depending on the time and situation” (23%) as shown in Figure 10. More consumers seem to adjust the serving temperature of sake according to time, place, and occasion. Although sake is a lot of times served chilled for international consumers, we should make them conscious of the fact that choosing the serving temperature suitable for the aroma and flavor of each sake is quite important. The international consumers who routinely drink sake “at room temperature” (10%) or “warmed” (5%) were the minority, and the former preconception of “SAKE is served HOT” has become obsolete.

Correspondence analysis was conducted to examine if there was any difference in the temperature of sake served by region. The correspondence analysis is a kind of intuitively understandable visualization method, which indicates a digitalized scatter chart so that the more correlated are plotted closer and the less correlated are farther apart. As shown in Figure 11, more consumers in Taiwan and China drink sake chilled, while more consumers in North America, Europe, Japan, and Hong Kong drink sake by adjusting the serving temperature depending on the time and situation.

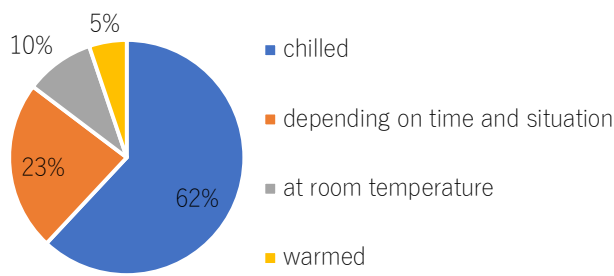


Figure 10 Temperature of Sake

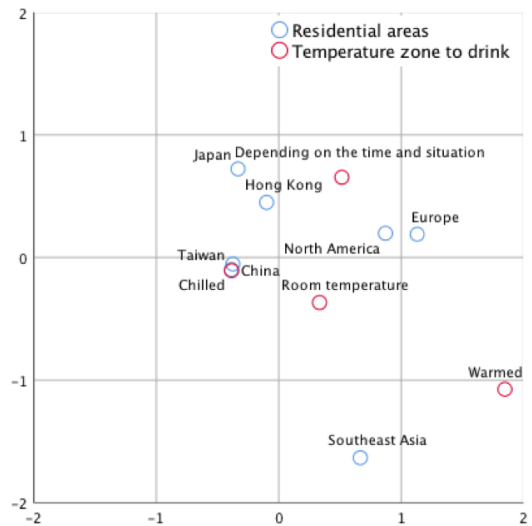


Figure 11 Temperature of Sake by Region

4.4 Type of Cuisine Paired with Sake

As shown in Figure 12, to the question “Do you usually drink sake while eating a meal?”, there were only a few (4%) who responded, “drinking sake and eating a meal are two different things”. On the other hand, “yes, I do so” (56%) and “depending on the time and situation” (40%) made up most of the responses, which indicates that many international consumers seem to drink sake with a meal in the same manner as wine.

We asked the 194 respondents who chose “yes, I do so” about the type of cuisine they have while drinking sake, the response of “Japanese food” was the leading answer (73%) as shown in Figure 13. The respondents who chose “food of your own country” (8%) were the minority. Japanese food is surely an important factor in serving sake for international consumers which is consistent with the previous question of the first encounter of sake.

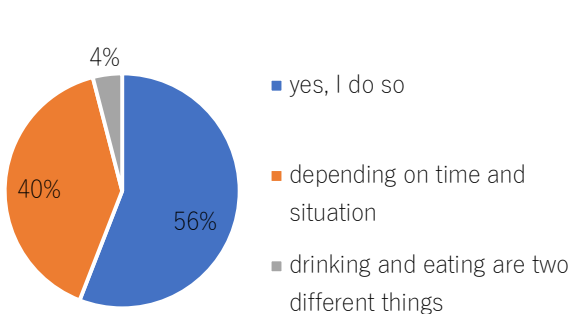


Figure 12 Do You Drink Sake during Meals?

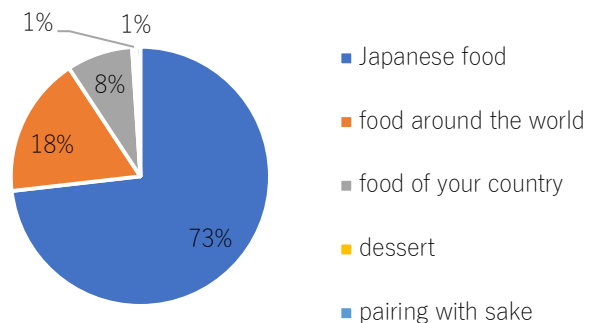


Figure 13 What Type of Food?

The “food around the world” was 18% of the response, and it was especially high for Taiwan and Hong Kong as shown in Figure 14. It seems to indicate that for people of Taiwan and Hong Kong, suggesting to pair sake with cuisine from around the world is recommended.

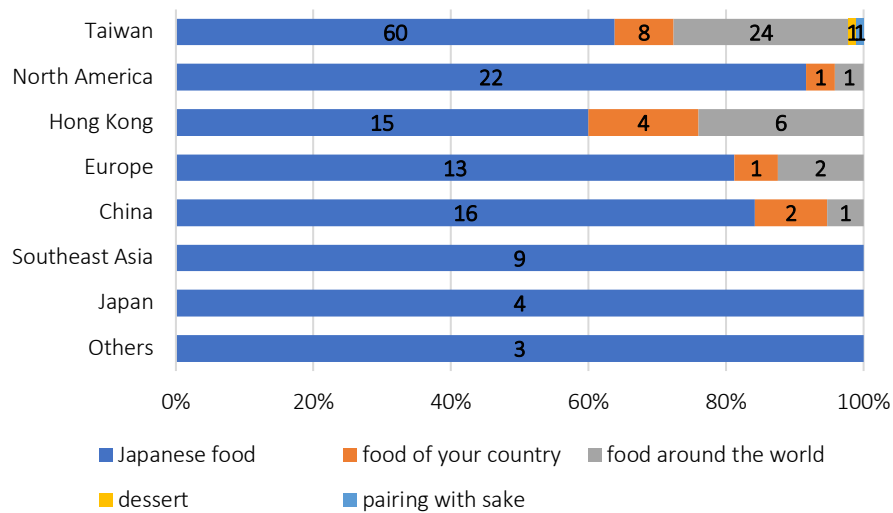


Figure 14 Type of Cuisine Paired with Sake by Region

4.5 Regular and Favorite Alcohol Beverage

To the question “What alcoholic beverage do you usually prefer to drink?”, we should note, following the expecting answer of “sake” (37%), “wine” came in second (32%) surpassing “beer”, as shown in Figure 15.

Furthermore, when asked about the reason for their choice of alcoholic beverage, the respondents who chose “tasty” (58%), “accustomed to drink” (20%), or “easily available” (16%) accounted for 94% as shown in Figure 16. From this result, when recommending sake to international consumers, it is advisable to remember to first ask their preference of sake.

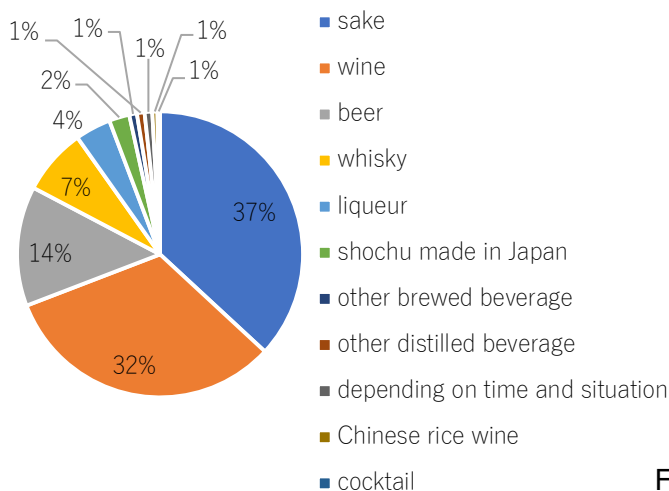


Figure 15 Choice of Regular Alcohol Beverage

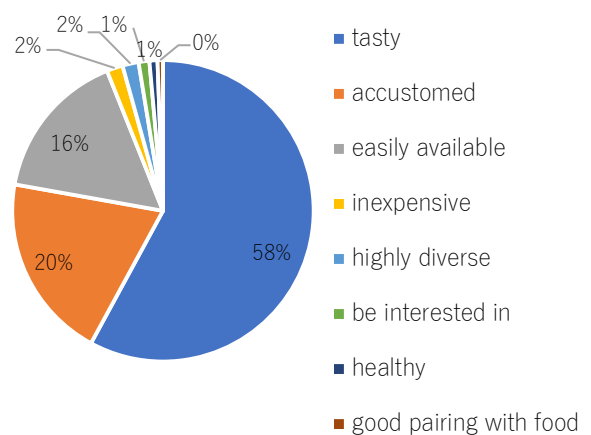


Figure 16 Reason to Choose that Alcohol Beverage

4.6 Sake Type Preference

The sake type preference of respondents according to the four-type classification of sake by the aroma and flavor is shown in Figure 17. The responses of “fruity and aromatic type” (28%), “light and refreshing type” (20%), and “full body and umami-rich type” (24%) are almost equal in number of responses, but “well-aged type” (3%) is considerably low. The result is an indication of the importance of explaining that there are four types of sake by the aroma and flavor to international consumers.

Assuming blindly that they prefer Ginjo-shu or Daiginjo-shu with fruity aroma should be avoided which can also be said for Japanese sake beginner. In addition, since the respondents who chose “do not care about the type” (22%) is quite high, it is effective to recommend sake which is suitable for season, scene, and meal. The small number of responses to “well-aged type” (3%) is probably due to the fact that there is little opportunity for it to be served overseas.

A correspondence analysis was conducted to examine if there was any difference in the favorite type of sake by region. Figure 18 indicates that many consumers who prefer fruity and aromatic type are in Hong Kong, light and refreshing type in Taiwan, and full body and umami-rich type in Europe, China, Southeast Asia, and North America.

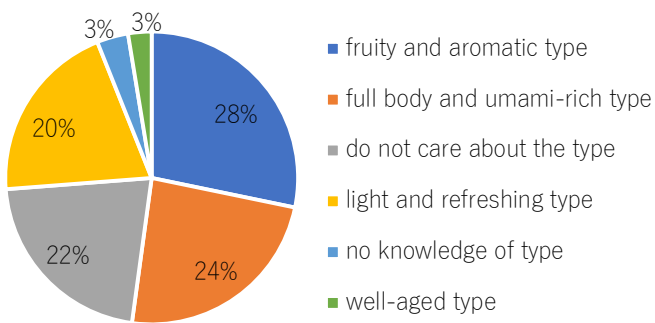


Figure 17 Favorite Type of Sake

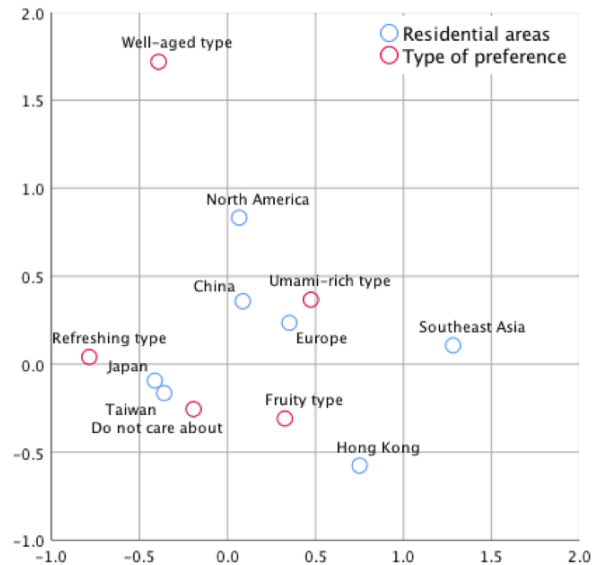


Figure 18 Favorite Type of Sake by Region

4.7 Deciding Factors in Sake Selection

Figure 19 shows the results of the question “What do you value the most when you select sake produced in Japan?” The response of “aroma and flavor” was the leading answer (64%), followed by “sake and food pairing” (18%). The respondents who chose “inexpensive” (4%), “popular” (2%), or “brand name” (3%) were the minority. The result clearly shows that explaining the aroma and flavor characteristics of sake is quite effective and recommending sake in light of the pairing with meals is also a good practice.

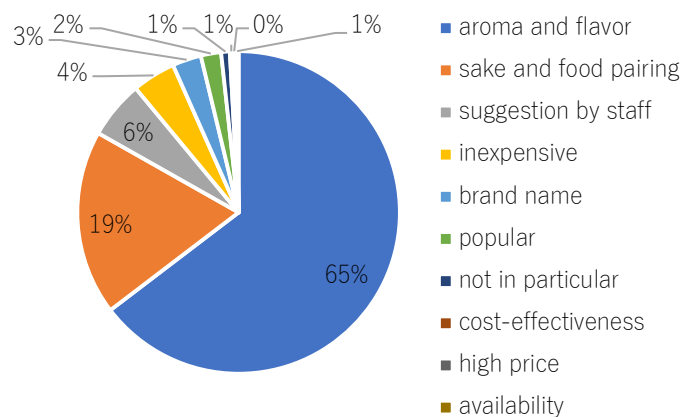


Figure 19 Deciding Factors in Sake Selection

4.8 Place of Preference to Drink

Figure 20 shows the results of the question “Where do you prefer most to drink sake?”. The responses of “eating out such as restaurant” (53%) or “your house” (41%) account for 94%. The number of people that prefer to drink sake at home was unexpectedly high.

Taiwan was the only region where “your house” scored more than “eating out”, as shown in Figure 21.

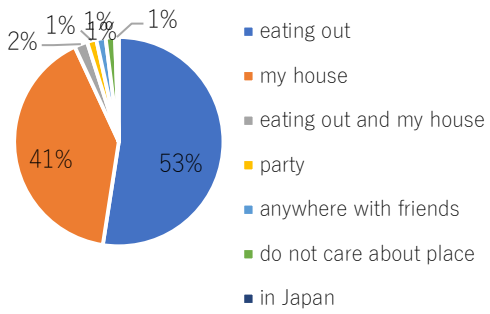


Figure 20 Places Preferred to Drink

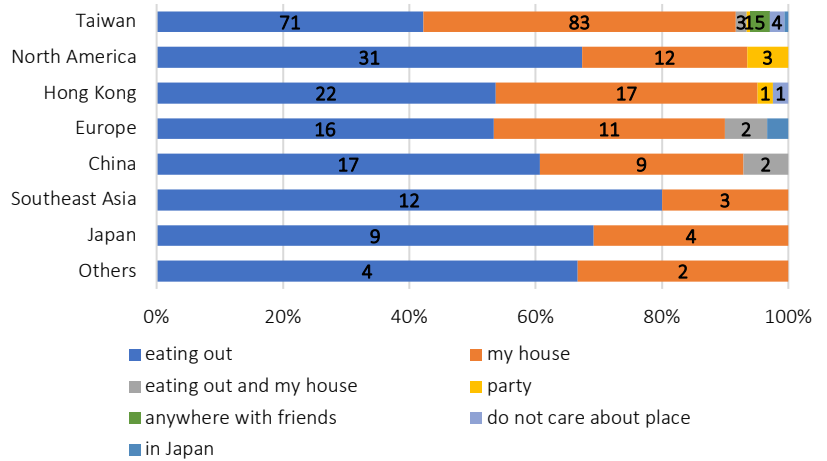


Figure 21 Places Preferred by Region

4.9 Places of Purchase

Figure 22 shows the results to the question “Where do you mainly purchase sake?”, in which respondents chose 1 or 2 closest options that apply.

“In Japan during the visit to Japan” is notably the top answer with 55%. By further analysis of the answer, we found that adding the respondents who just chose the option “duty-free shop in airport or seaport”, the percentage of people buying sake in Japan becomes 57%. The response of “liquor stores” was the most popular answer, when they purchase in their countries. Since many of the respondents answered they drink sake at home, it is important to explain how to drink and enjoy sake while they are purchasing at the stores in Japan.

A correspondence analysis was conducted to examine if there was any difference by region where they purchase sake. Figure 23 shows that there is a clear difference where they purchase by different regions. In Hong Kong people buy at supermarkets; in China at liquor floor of department stores and online shopping websites; in Taiwan at liquor stores; and in North America at Japanese or Asian groceries. This indicates that local sake distributors and retailers vary from one region to another.

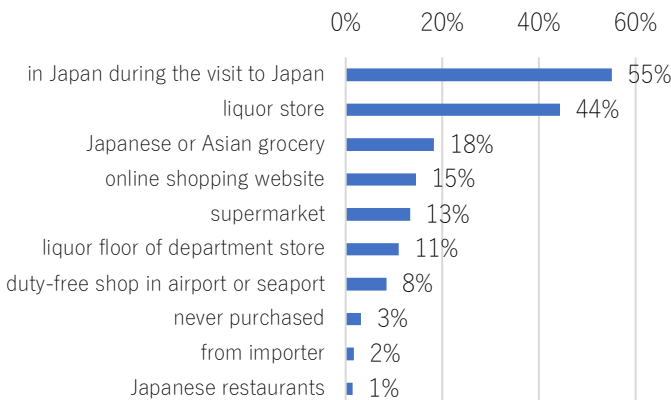


Figure 22 Places of Purchase

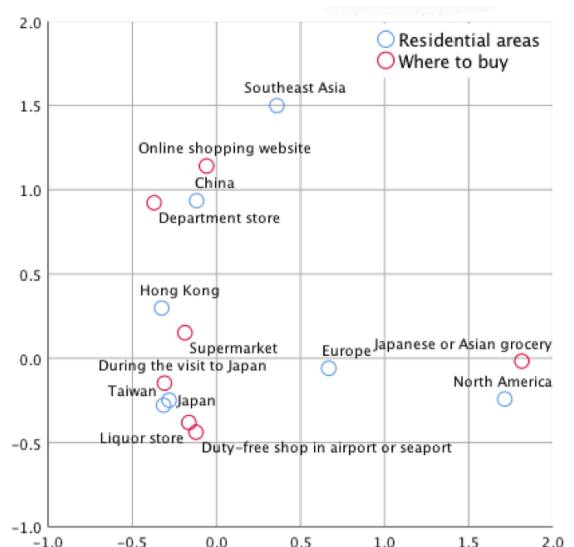


Figure 23 Places of Purchase by Region

4.10 Size and Price of Sake Purchased at a Liquor Store

As shown in Figure 24, for the question about the size of sake purchased at a liquor store, the answer of “720mL” was 80% at the top. This result is obvious because the bottle of 720mL is the most common size distributed overseas.

The price they paid for a bottle of 720mL, 3000yen level was the most common at 29.1%, closely followed by 4000yen level at 27%, shown in Figure 25. Since these 720mL bottles are the top-selling products at 1,000-yen level in Japan, it is two to three times higher. The much higher retail price overseas is due to the usual customs duty, liquor tax, shipping cost, and importer’s margin added to the cost. In Hong Kong, however, the price of sake is suppressed about 1.5 times of that of Japan because there is no customs duty and liquor tax levied.

A correspondence analysis was conducted to examine if there was any difference in the price of sake purchased at liquor store by region. Figure 26 shows that the price bracket of a 720mL bottle is higher in China, Hong Kong, and Taiwan, but comparatively lower in Europe and North America, and for obvious reason, lowest in Japan.

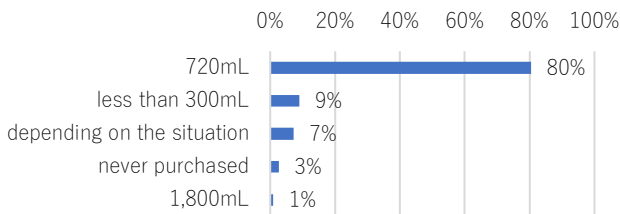


Figure 24 Size of Bottle Purchased

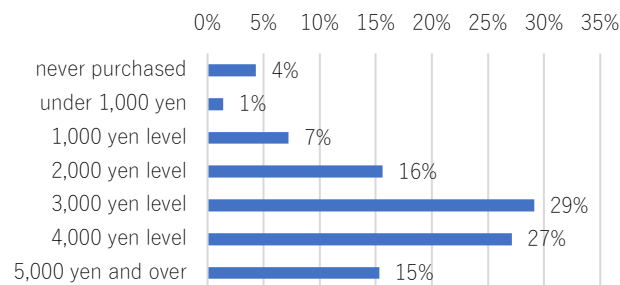


Figure 25 Price of 720mL Bottle

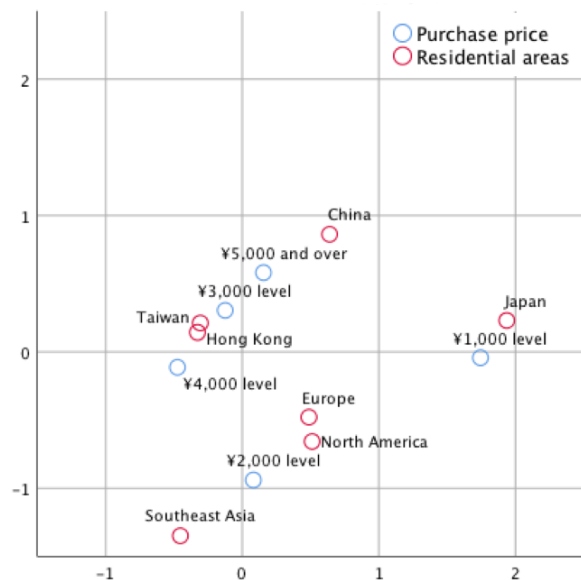


Figure 26 Price of 720mL Bottle by Region

4.11 Size and Price of Sake Ordered at a Restaurant

As shown in Figure 27, “by the glass” (51%) was the most common response to the question “What size of sake do you usually order at a restaurant?”, followed by “bottle 720mL (42%), accounting for more than 90%. Very similar to Japan, ordering sake by the glass has become more common at restaurant overseas.

To the question “When you order a bottle of 720mL sake at a restaurant, how much do you usually pay for it?”, the response of “4,000-yen level and 5,000-yen level” was the leading answer (28%), followed by “6,000-yen level and 7,000-yen level” (20%), and “2,000-yen level and 3,000-yen level” (16%), accounting for more than 60% , as shown in Figure 28. The most common response of “4,000-yen level and 5,000-yen level” seems to be slightly higher than the price range served in Japan.

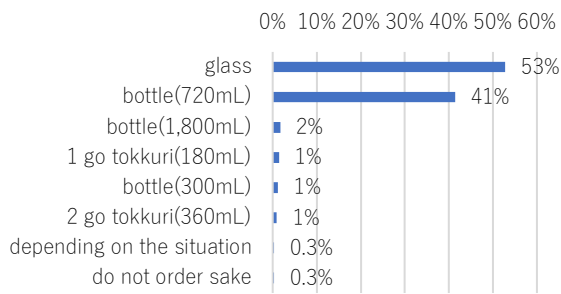


Figure 27 Size Ordered in Restaurants

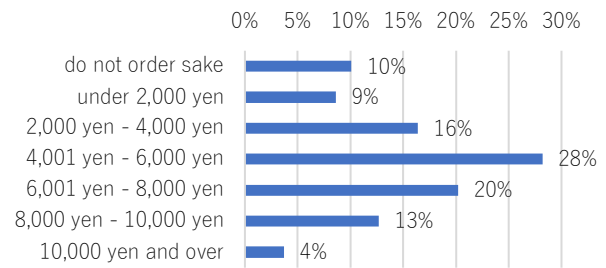


Figure 28 Price of 720mL Ordered in Restaurants

Figure 29 shows the price of a bottle of 720mL sake ordered at a restaurant by region, which points out that the price is higher in China, Hong Kong, and Southeast Asia than in North America, Europe, and Taiwan. Figure 30 shows that respondents in their 20's prefer smaller sizes, indicating that smaller size assortment of sake should be a wiser strategy. Service of sake by the glass is appreciated by 30's and 40's as well as 20's and should be the key service of sake. However, there is a concern that the people in the restaurant business do not have information about the storage and deterioration of sake. Some types of sake starts deteriorating right after opening the bottle. It seems to be that 1800mL bottle is rare served in restaurants overseas.

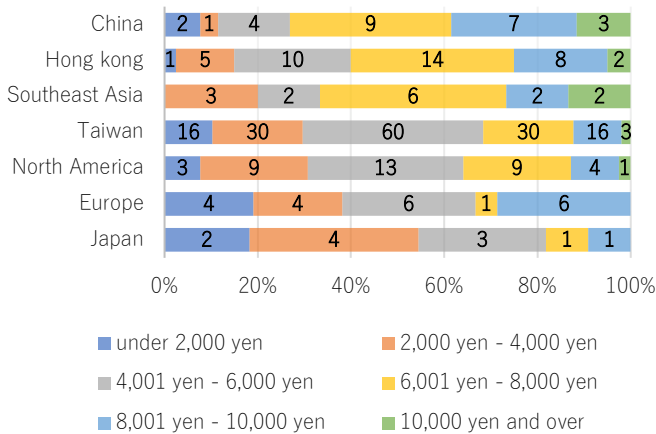


Figure 29 Price of 720mL Ordered in Restaurant by Region

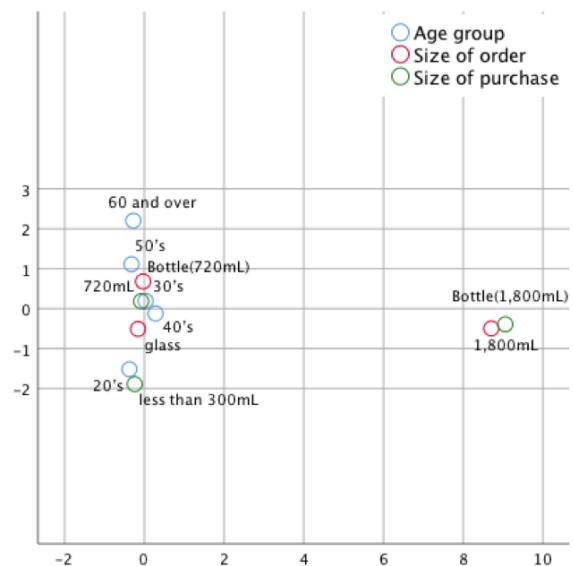


Figure 30 Size Purchased/Ordered by Age Group

4.12 Evaluation of Sake Produced in Japan and Overseas

4.12.1 Strong Preference to Sake Produced in Japan

In recent years, sake is also produced overseas, and has 4 times the volume compared to those exported from Japan. Since 2016, some of the overseas produced sake has been awarded medals in the Sake genre by IWC (International Wine Challenge) which is a competition organized in England for alcohol beverages. Figure 31 shows the response to the question "When you order or purchase sake, do you specify sake produced in Japan". About three quarters of respondents chose "always choose sake produced in Japan", which shows that many international consumers are sticking to sake produced in Japan.

Figure 32 shows the result of the correspondence analysis by region. The response of "choose sake

produced in Japan according to time, place and occasion” was the most common response in North America. In the United States, sake has been produced locally since the 80’s, by major Japanese sake breweries. About 80% of those are consumed within the United States, and the rest exported to Europe and other countries. This seems to be the reason to the common response of “choose sake produced in Japan according to time, place and occasion” in North America. On the other hand, many respondents living in Japan chose “do not care”. Currently, there is a trend among Japanese who love sake to value sake produced in foreign countries regardless of the aroma and flavor. They choose sake produced in foreign countries for something to talk about when they find it in restaurants. The same may be said of international people living in Japan.

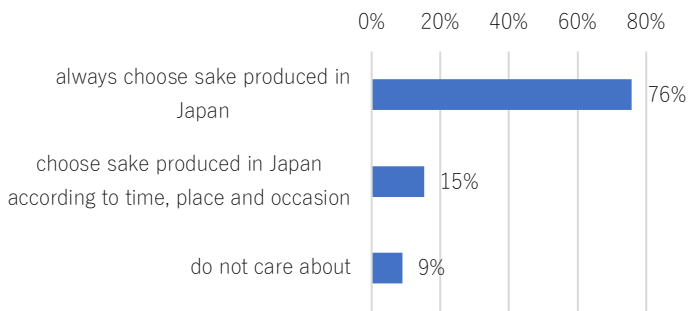


Figure 31 Choice of Sake Produced in Japan

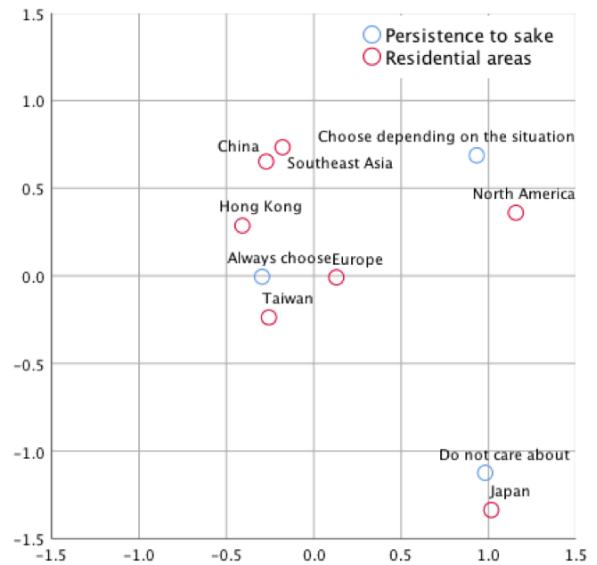


Figure 32 Choice of Sake Produced in Japan by Region

To understand the background of the choice and evaluation of Japanese products and other countries, we asked the following 4 questions; “suit your taste?”, “quality is high?”, “too expensive?”, and “many opportunities to buy and easily available?”.

4.12.2 “Suit Your Taste?”

Figure 33 shows the responses to the questions “Does sake produced in Japan suit your taste ?” and “Dose sake produced in countries other than Japan suit your taste?”. 97% of respondents answered sake produced in Japan suits their taste. There were more respondents answering sake produced overseas does not suit their taste.

4.12.3 “How is the Quality?”

Figure 34 shows the result for the question “Is the quality of sake high” for both Japanese and overseas products. 87% of the respondents answered the quality of sake produced in Japan is high, but only 11% answered high for sake produced overseas. Most respondents seem to recognize the quality of sake produced in Japan is higher than sake produced overseas.

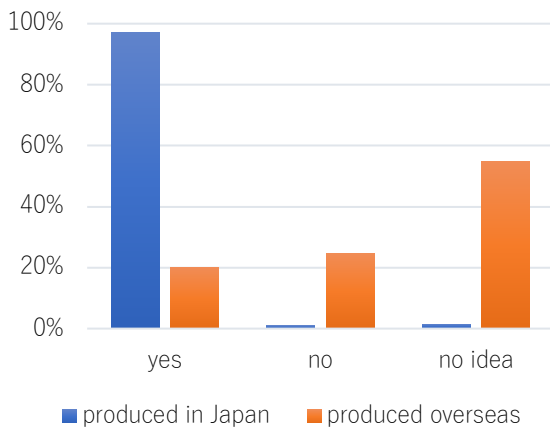


Figure 33 Suit Your Taste?

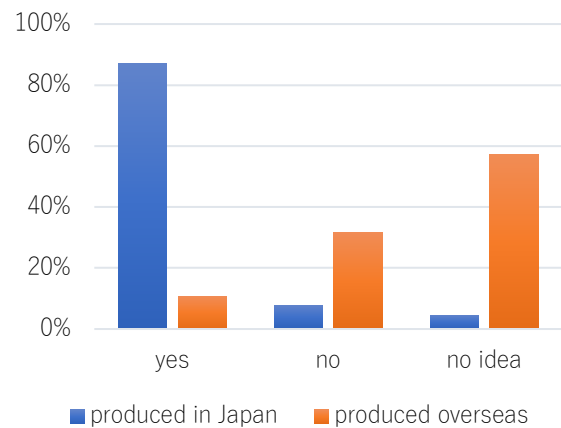


Figure 34 Quality High?

4.12.4 “Too Expensive?”

Figure 35 shows the result of the question “Is the sake produced in Japan too expensive? How about sake produced overseas”. 47% answered sake produced in Japan is too expensive and 44% did not think so. Since previous questions have shown that 3,000-yen level and 4,000-yen level are the most common price brackets for 720mL bottle overseas (cf. Figure 25), sake produced in Japan is not considered too expensive compared to wine and other alcohols.

A correspondence analysis was carried out to examine which regions perceived sake produced in Japan “expensive”. As shown in Figure 36, many respondents in Taiwan evaluate sake produced in Japan to be expensive. On the other hand, many respondents in China and Hong Kong evaluated it as not too expensive.

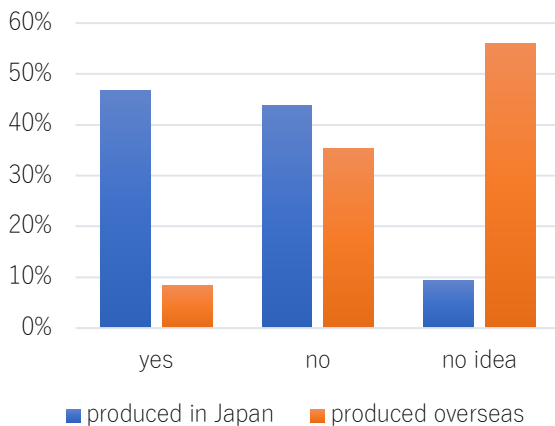


Figure 35 Too Expensive?

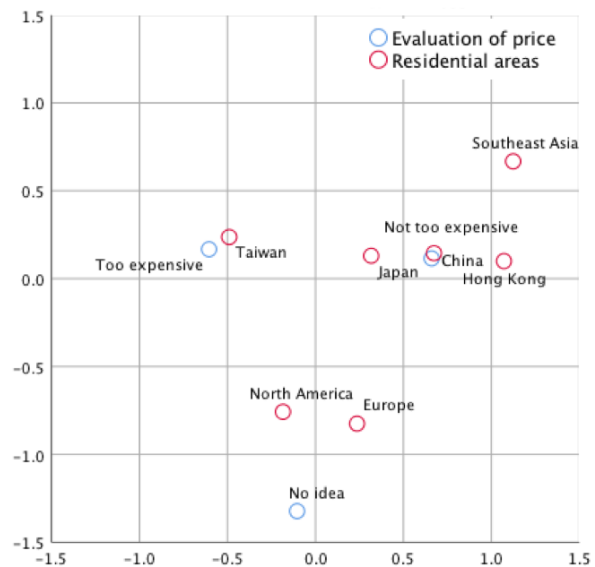


Figure 36 Evaluation on Price of Sake Produced in Japan by Region

4.12.15 Opportunities to Buy and Availability of Brands

Figure 37 shows the response to the question “Are there many opportunities to buy sake and easily available?” for both that is produced in Japan and overseas. While 46% of respondents answered sake produced in Japan is easily available, 50% of respondents answered it is not easily available.

Figure 38 is the result of the correspondence analysis between resident regions and availability of sake brands produced in Japan. Many respondents in North America, Hong Kong, and Southeast Asia answered sake produced in Japan is easily available whereas many respondents in China and Taiwan

answered it is not easily available. This indicates that sake produced in Japan is not exported as much in variety of brands to Taiwan and especially to China, compared with that of to Hong Kong. It can be assumed that residents in Hong Kong have greater knowledge of Japanese brands.

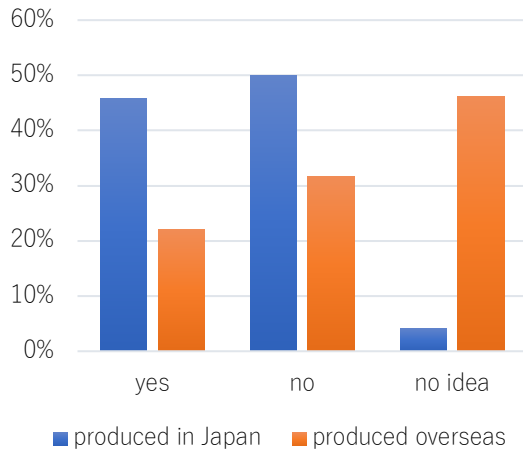


Figure 37 Opportunities to Buy

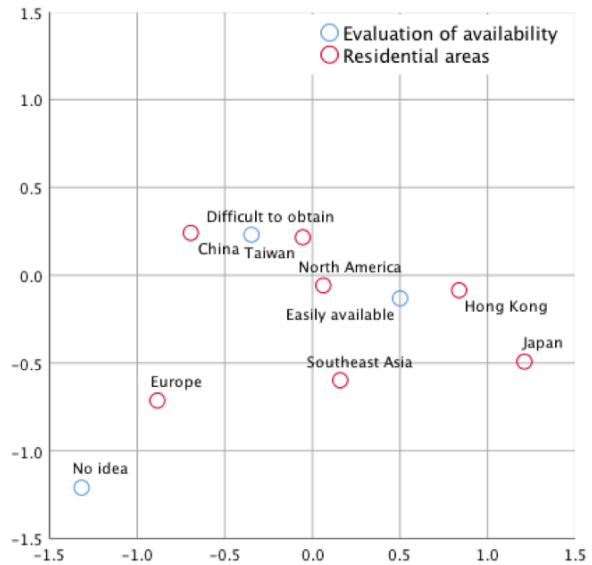


Figure 38 Availability of Sake Brands Produced in Japan by region

4.12.6 Evaluation on Sake Produced Overseas by Region

As the next step, correspondence analyses were conducted to examine the difference in evaluation towards sake produced overseas by region. We were especially interested in the result of North America where there is a history of locally produced sake, and Europe where there is a very long history of wine culture (cf. Figure 39 and Figure 40).

The results show that evaluation on the quality of sake produced overseas is almost the same for North America and Europe. Consumers in Europe tend to have little appreciation for sake produced overseas, but North American consumers think sake produced overseas suit their taste. This indicates that sake produced locally in North America has taken root. It is also due to North American consumers choose sake according to time, place and occasion (cf. Figure 32). On the other hand, consumers in Europe value sake “made in Japan”.

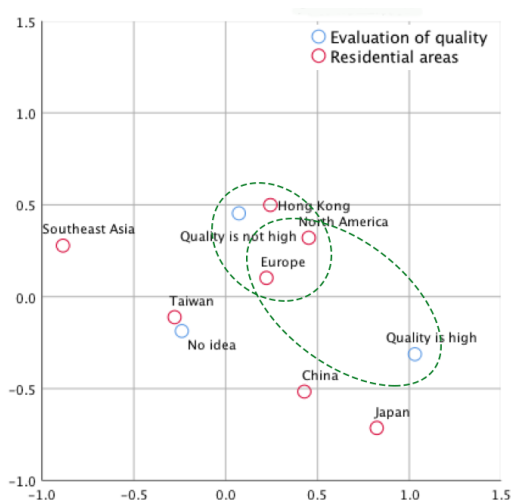


Figure 39 Evaluation on Quality of Sake Produced Overseas by Region

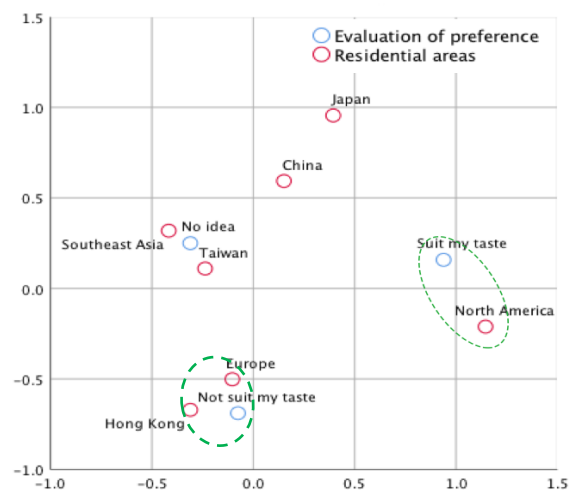


Figure 40 Evaluation on Preference of Sake Produced Overseas by Region

4.13 Future Demand and Growth of Sake Produced in Japan

4.13.1 Demand of Sake Produced in Japan

To the question “Do you think the demand for sake produced in Japan will increase in your country?”, combining “very much” (33%) with “quite a lot” (52%) accounts for 85% as shown in Figure 41. This indicates that many international consumers think the demand for sake produced in Japan will increase in their resident regions in the future.

In addition, a correspondence analysis was conducted to examine if there was any difference in the demand for sake produced in Japan by region. As shown in Figure 42, many respondents answered “very much” in Southeast Asia, Hong Kong and North America, “quite a lot” in Taiwan and China. Meanwhile, many respondents in Europe answered, “a little” or “no idea”. The demand for sake produced in Japan is expected to increase especially in Asia and North America.

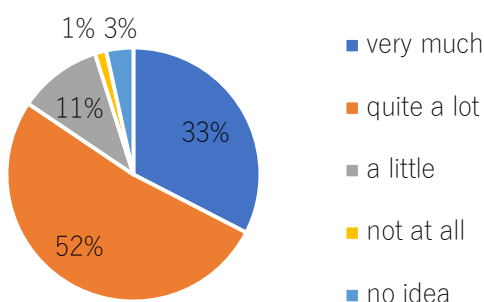


Figure 41 Future Demand for Japanese Products

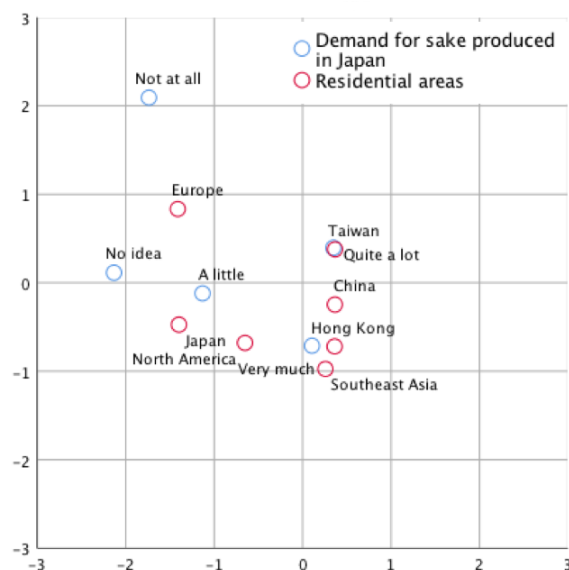


Figure 42 Future Demand for Japanese Products by Region

4.13.2 Suggested Action to Increase Sake Fans

To the question “In your country or region, what action do you think should be taken to increase the fans for sake produced in Japan?” with no limit of selectable options, more than half of the respondents (56%) answered “spread Japanese culture and enhance the interest in sake” as shown in Figure 43. This result parallels the response to the first sake experience, “interest in Japanese culture” and “interest in Japanese food”. In conclusion, to expose international consumers to Japanese culture and food should be the important strategy in promotion of sake. The runner-up of response was “increase variety of type and price” (47%), followed by “increase places to buy” (41%), “provide more product information” (32%), propose ways to drink sake” (29%), and “provide types of sake for casual scenes” (25%).

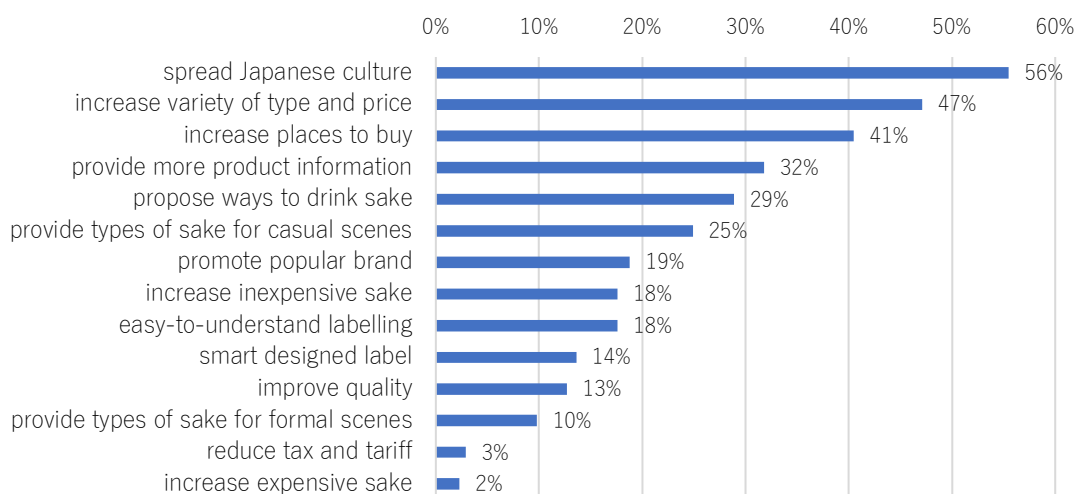


Figure 43 Actions to Increase Sake Fans

5. Opinions or Suggestions on Sake Produced in Japan

To the final question “Please feel free to write your opinion or suggestion on sake produced in Japan”, there were 110 responses. From the responses, representative responses are picked up and summarized.

5.1 Price Setting

There are suggestions on price setting, such as “Sake is too expensive compared to wine. If we can drink sake more cheaply at restaurants, we will gain a deeper understanding of sake.” (Canada), and “If the price of 720ml bottle is high, people who drink sake for the first time have difficulty in buying it. The 300ml bottle is suitable when bringing sake of new brand name from Japan.” (America).

5.2 Education for Serving Staff

The lack of knowledge of the serving staff is pointed out, such as “It is important that people working in the food and beverage industry are educated to deepen their knowledge about the product and to sell it in the right way.” (Italy), and “There are few staff at restaurants who can make an educated comment on sake. Basically, restaurant staff members do not possess the knowledge of Sake” (Taiwan).

5.3 Methods of Service

There were opinions on sake served in Korea, such as “Sake should be served at popular restaurants other than Japanese restaurants.” (Korea), and “I am often disappointed because paper packed sake is frequently served at Japanese-style bar.” (Korea). There were few proposals for ways of drinking sake, such as “I want to be informed of recommended ways of drinking sake. General consumers do not know there are various ways of drinking sake.” (Taiwan).

5.4 Sake and Food Pairing

Many responses were for sake and Japanese food pairing. “It is necessary to propose a pairing with various kinds of Japanese food.” (America), and “Japanese restaurants introduce sake as a pairing with food.” (America). Respondents from China and Korea stress that pairing local food should also be focused, such as “Sake should be paired with local food preserving special characteristics of sake.” (China), “There is a biased view that sake does not go well with Korean food.” (Korea), and “It is necessary for sake to come close to Korean food culture.” (Korea).

5.5 Opportunity to Buy Sake

There are many requests concerning the availability of sake, such as “High-quality sake is not available.” (Sweden), “Wine is available in a supermarket, but sake is unobtainable in it.” (Philippines), “Sake will be conspicuous if displaced next to wine as an optional extra.” (America), “It is useful if the places will increase, where we can easily buy sake like beer.” (Korea), and “It is better if the places will increase, where sake attracts our notice.” (Korea). This coincides with the result that many respondents answered “increase places to buy” (41%) to the question “What action should be taken to increase the fans for sake produced in Japan?”.

5.6 Quality Management

Many respondents pointed out that the quality control of sake should be enhanced during shipment and in local sales outlets. Local distributors and others should be educated about the quality control of sake, such as “The difference in the quality of sake is large between purchased in Japan and America.” (America), “Great product storing and logistics are a big issue in Dubai, no experts in the local distributors.” (UAE), and “The temperature of sake during shipment should be properly managed by distributor.” (Taiwan). In addition, there are opinions, such as “It is hard to maintain the quality of Junmai or Junmai Ginjo Nama Genshu.” (America), and “I hope the storage life and best suited drinking period of sake will be prolonged.” (Taiwan).

5.7 More Information of Sake

Many suggestions were made concerning one of the most common responses “provide more product information” (32%) to the question “What action should be taken to increase the fans for sake produced in Japan?” Many respondents pointed out little information service of sake, such as “Getting information and knowledge in Spanish is key.” (Spain), “Many people think there is only one variety of sake.” (Germany), “Many people don't know why better-quality sake is expensive.” (Germany), “Introduce the variety and different qualities of various sake” (America), “General consumers think tasty sake is only Daiginjyo or Junmai Daiginjyo.” (Taiwan), and “More website or mobile Apps in English or Chinese for independent rating and tasting notes included” (Hong Kong).

5.8 Events

Many respondents hope that more events on sake are held on-site, such as “I think that the best way to make Japanese sake popular is to present it in Japanese restaurants and ethnic food festivals.” (Italy), “Need more education via promotional fares such as Japanese days” (Bahrain), “Provide more sake dinner, tasting event and class” (Hong Kong), and “I would like to see the Japanese government and the regional prefectural governments help promote sake in Canada.” (Canada). In addition, many respondents hope that there are more events on sake with specific themes, such as “Sales promotion of sake should be strengthened for consumers who have not experienced to drink sake.” (Hong Kong), “Sales promotion of sake should be conducted by prefecture.” (Hong Kong), and “Sales promotion of sake is required for young people.” (Korea).

5.9 Communication and Tour of Brewery

Many respondents desire communication and tour of brewery, such as “Tours of sake brewery should be advertised overseas.” (Hong Kong), “More tours of sake brewery are desired.” (China), and “More tasting events with brewery are desired.” (Taiwan). This indicates that increasing the opportunity to visit sake brewery has efficacy for inbound tourists.

5.10 Appealing the Aroma and Flavor of Sake

New types of taste and appealing methods were suggested in addition to the classification of specially designated sake and four-type classification of sake by the aroma and flavor, such as “The current classification method gave incorrect message to customer.” (China), and “A new taste of sake should be created to get more customers.” (China). Improvements on the label were also pointed out, such as “Sake should adopt a friendlier label by having English description and also reading material for consumers.” (Singapore).

5.11 Locality (Local Sake)

Some answers were about the appeal of locally produced sake reflecting the nature, soil and climate of the region (terroir). “US customers want to be able to tour a Sake brewery using all local ingredients and be able to sample buy and drink in that location.” (America), and “Good sake should be made regionally.” (Germany).

5.12 Custom Duty etc.

The higher price of sake due to the custom duty, liquor tax, and import cost seems to be a major obstacle in the propagation of sake. For example, Taiwan has much demand for sake and the market size is big, but they put custom duty of 40% for sake. “In Taiwan, sake is more expensive than other alcoholic beverages due to the custom duty.” (Taiwan), “Although sake has high potential in the market, sake is too expensive due to the unreasonable custom duty.” (Taiwan), “If sake gets less expensive by reducing the liquor tax and cost of distribution, sake will attract consumer’s attention and spread among consumers.” (Korea), and “Sake is expensive almost same as fine wine due to the high import cost and difficult to approach.” (France).

5.13 Internationalization of Sake Qualification

Qualification of sake by the qualified person of the region to provide information to general consumers, seems to be an important strategy to obtain new consumers. “Internationalization of qualification for sake is seen as a good thing.” (Korea), and “We are lucky in the UK to be able to pass examination on Sake. It gives us much support in understanding the product and suggesting it to others.” (England).

6. Proposals for Improving the Service Styles

Based on the result of this survey, we have four proposals for the service styles for international consumers.

6.1 Understand the Interest towards Japanese Cuisine

To the question “When were you first introduced to sake?”, “interest in Japanese food” was the most common response. In addition, the type of food eaten while drinking sake was predominantly Japanese food. It is, therefore, essential to have a deep insight into Japanese food when targeting at international consumers.

6.2 Understand the Interest of towards Japanese Culture

Interest in Japanese culture was also the common response to the question “When were you first introduced to sake?”. It is also desirable to have extended knowledge of Japanese culture.

6.3 Usage of Four-Type Classification by Aroma and Flavor

To the question about the favorite type of sake, the consumers choosing the fruity and aromatic type, the light and refreshing type, and the full body and umami-rich type were almost equal in numbers. To

the question about the important factors when choosing sake, the response of “aroma and flavor” was the leading answer, followed by “sake and food pairing”, on the other hand, the respondents who chose “popular”, “inexpensive” or “high price” were smaller in number. These results indicate that the four-type classification of sake by the aroma and flavor proposed by SSI (Sake Service Institute) should be quite effective.

6.4 Target Wine Lovers

The survey shows that wine lovers are interested in sake as well. Wine is enjoyed all over the world not only by wine connoisseurs, but also by regular wine drinkers with less knowledge, and those wine lovers are most suited as the targets to promote sake. They are also quick to understand sake, because wine and sake are both brewed alcohol beverage and enjoyed with meals.

7. Remarks

We have extracted some interesting points from the result of the preference survey on sake targeted at international consumers. Based on the survey results, we have suggested four effective strategies to promote sake for international consumers.

Tokyo Olympic & Paralympic Games is coming up soon and Osaka World Exposition will take place in 2025. Tourist to Japan is expected to continue increasing. Since sake is a proud Japanese culture, we should take this opportunity to carry on the survey research to optimize the advantages of sake, and promote international friendship with people around the world through sake.

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* Research and Evaluation Group of Local Sake (established in 2013) :

The group is composed of professional tasters affiliated with SSI (24 members as of July 2018). The group evaluates the characteristic features of local sake (sake made by independent breweries) by tasting and conducts research on the local sake to publish the report.